

Product Release Notes for ACTIVEWORKS Endurance – May 15, 2019

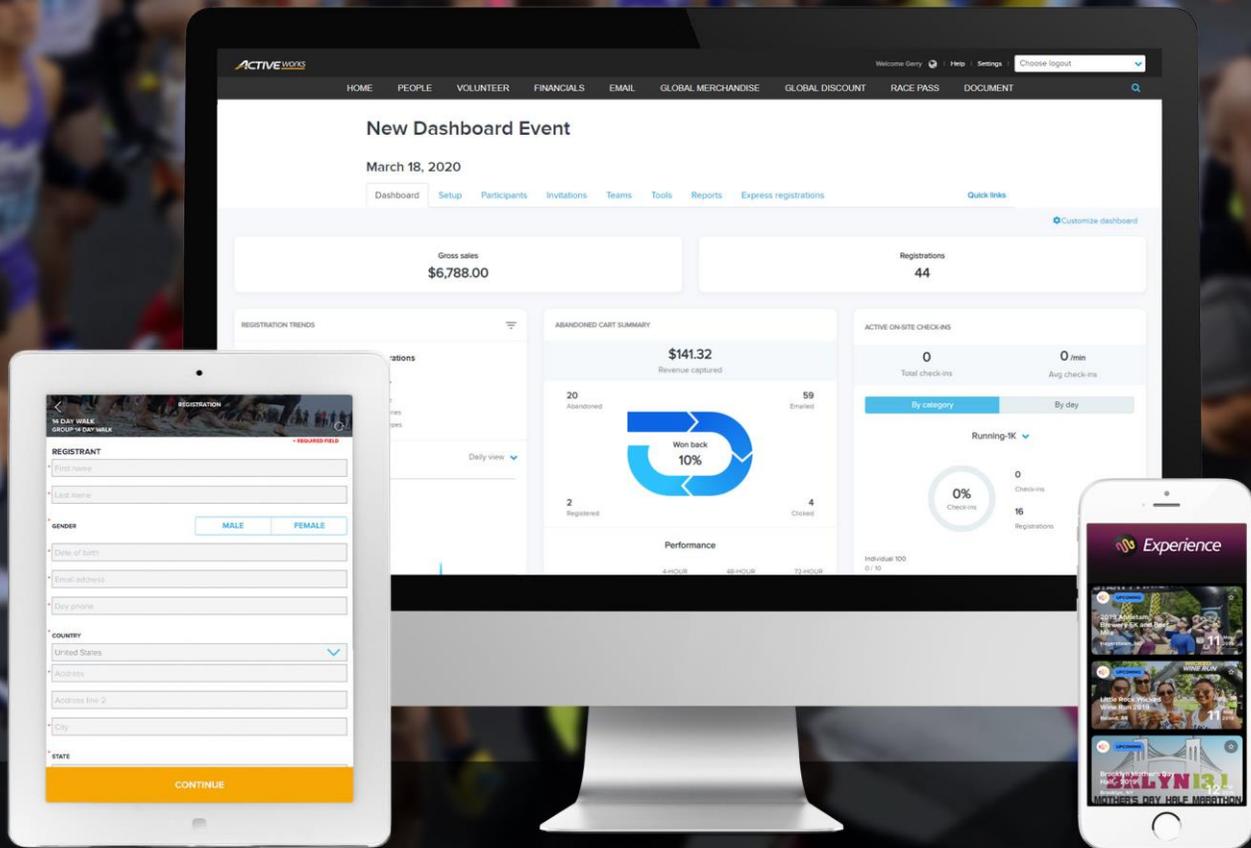


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New event-level Dashboard

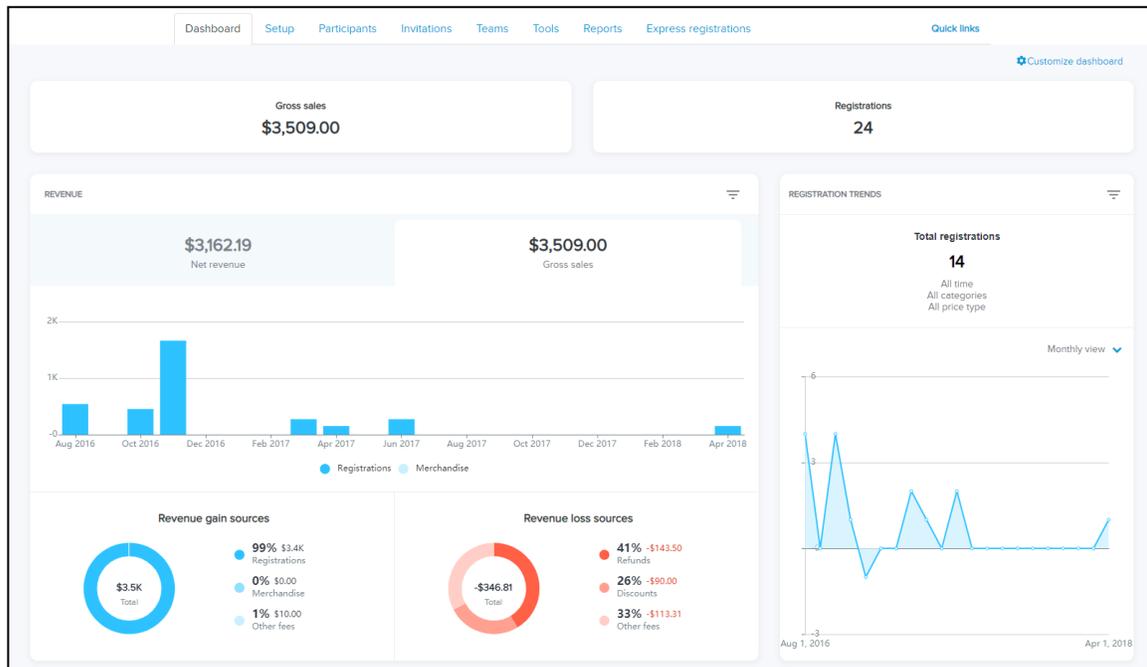
ACTIVE Network is proud to present the first release of our new event-level **Dashboard** (a Premium-tier feature).

More than ever before, you and your staff are now able to view an event's key performance indicators at-a-glance and make informed business decisions without having to spend hours combing through spreadsheet reports.

The **Dashboard** is fully customizable to each staff user's needs with components that are visible only to users with the appropriate permissions.

In subsequent releases, many more new **Dashboard** components will be released, giving you and your staff powerful insights into all aspects of your events.

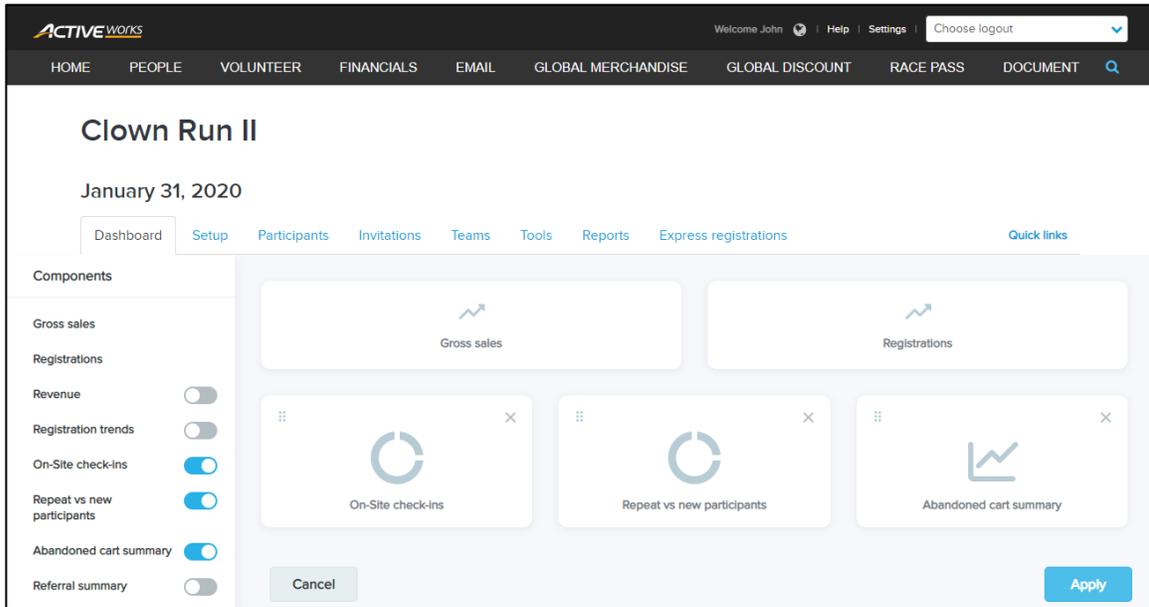
To access an event's **Dashboard**, simply click the **HOME** tab > **Your events** tab > an event > **Dashboard** tab:





Dashboard customization

You and your staff can customize the components displayed on your **Dashboards** by clicking the **Customize dashboard** link. In the **Components** menu, switch on the required components and then drag-and-drop them into the required order:



To protect your organization's sensitive business information, specific **Dashboard** components are available only to users with the appropriate permissions:

Component	Required permission	Roles with the required permission					
		Owner	Accountant	Coordinator	Assistant	Timer	Custom*
Gross sales	Event financial reports	✓	✓	✓			✓
Registrations	View participant data	✓	✓	✓	✓	✓	✓
Revenue	Event financial reports	✓	✓	✓			✓
Registration trends	View participant data	✓	✓	✓	✓	✓	✓
On-site check-ins	View participant data	✓	✓	✓	✓	✓	✓
Repeat vs new participants	View participant data	✓	✓	✓	✓	✓	✓
Abandoned cart summary	Event financial reports	✓	✓	✓			✓

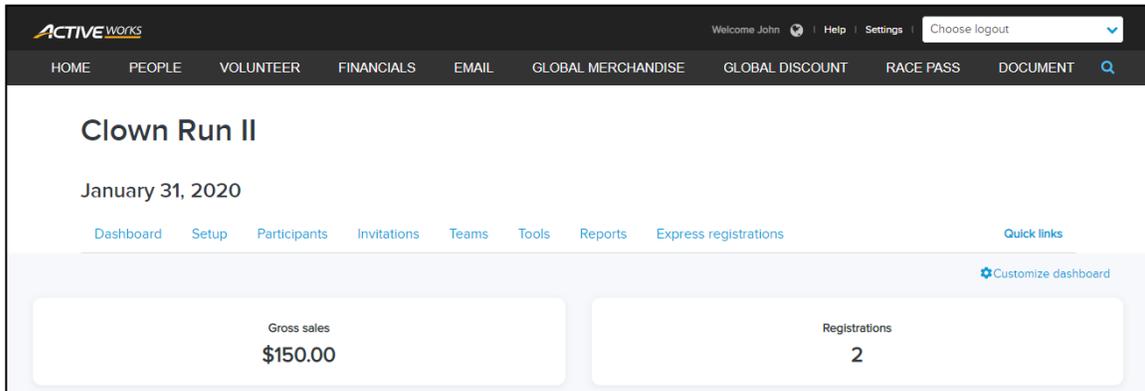
*Custom roles with the required permission selected.



Volunteer coordinators and **Volunteer captains** without the **Event financial reports** and **View participant data** permissions cannot see the **Dashboard**.

Gross sales and Registrations components

See at-a-glance your event's **Gross sales** and total number of **Registrations** at the top of the **Dashboard**:

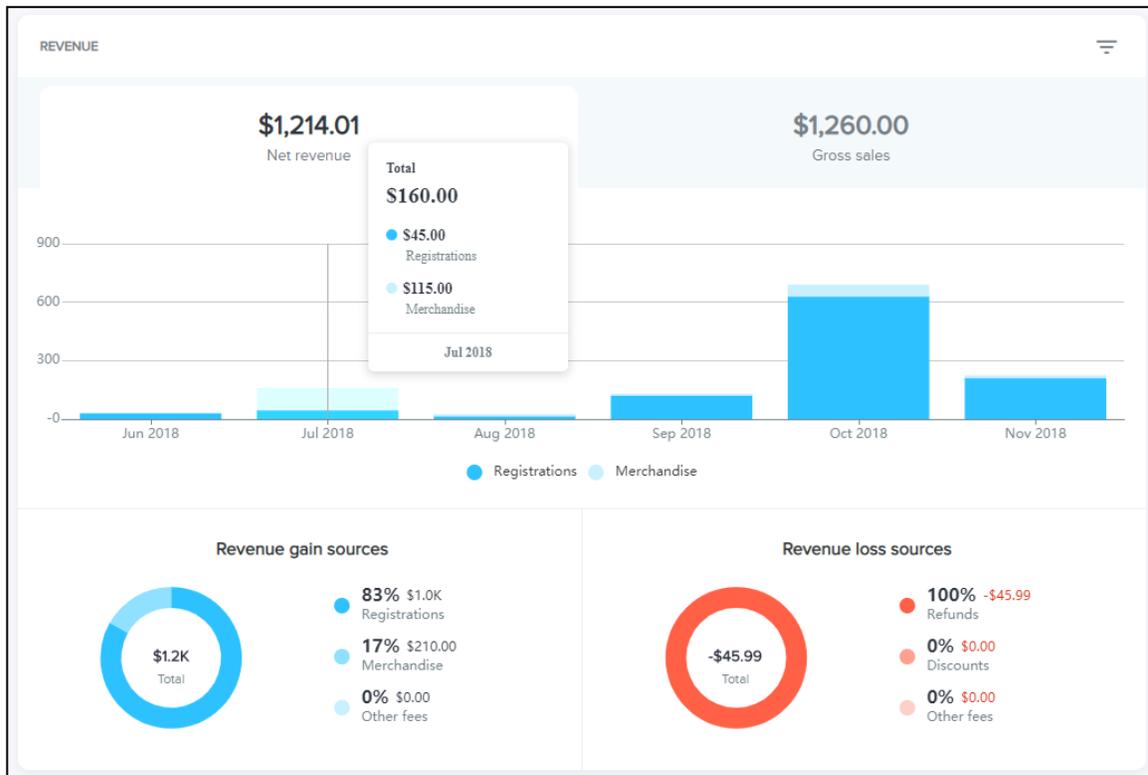


Note: The **Gross sales** and **Revenue** components are fixed at the top of the dashboard and cannot be moved or hidden. They are automatically hidden from users without the required permissions.



Revenue component

See where your event's revenues originate by time (click  to set the **Date range**) and by **Registrations** and **Merchandise** sales. Also, keep track of your event's **Revenue loss sources** by **Refunds**, **Discounts** and **Other fees**, and take remedial action before losses get out of hand.



View the bar chart by:

- **Gross sales**, which is the sum of all sales at the full product price (including sales which may be subject to cancellations, refunds, failed payments and chargebacks). Discounts and processing fees paid by your organization are NOT deducted from the **Gross sales**.

Gross sales = (sales at the full product price) – (customer-paid processing fees)

- **Net revenue**, which is the amount that ACTIVE remits to your organization.

Net revenue = **Gross sales** – discounts – (processing fees paid by your organization) – cancellations – refunds – (failed payments) – chargebacks

The bar chart breaks down the net revenue/gross sales into yearly, monthly, weekly or daily intervals, depending on the selected **Date range**. Each bar also breaks down the amount in each time interval into **Registrations** and **Merchandise** contributions.



- Hover the cursor over a bar to display the **Total**, **Registrations** and **Merchandise** amounts in that time interval.
- To hide or unhide registrations or merchandise contributions, toggle the **Registrations** or **Merchandise** legends at the bottom of the bar chart.

The **Revenue gain sources** ring chart displays the relative revenue contributions from **Registrations**, **Merchandise** sales and **Other fees**. Percentages and amounts for these contributions are displayed to the right of the chart and are calculated as:

$$\text{Total} = \text{Registrations} + \text{Merchandise} + (\text{Other fees}) = \text{Gross sales}$$

$$\text{Registrations \%} = 100 * \text{Registrations} / \text{Total}$$

Registrations = gross sales for registrations at their full price

$$\text{Merchandise \%} = 100 * \text{Merchandise} / \text{Total}$$

Merchandise = gross sales for merchandise items at their full price

$$\text{Other fees \%} = 100 * (\text{Other fees}) / \text{Total}$$

Other fees = **Gross sales** - **Registrations** - **Merchandise**

The **Revenue loss sources** ring chart displays the relative revenue losses from **Refunds**, **Discounts** and **Other fees**. Percentages and amounts for these losses are displayed to the right of the chart and are calculated as:

$$\text{Total} = \text{Refunds} + \text{Discounts} + \text{Other fees}$$

$$\text{Refunds \%} = 100 * \text{Refunds} / \text{Total}$$

Refunds = cancellation refunds + applied credit refunds

$$\text{Discounts \%} = 100 * \text{Discounts} / \text{Total}$$

Discounts = (coupon codes) + (global discounts) + (team discounts)
+ (VIP discounts) + (PromoLink discounts)
+ (abandoned cart discounts) + (net price discounts)
+ (multi-person discounts)

$$\text{Other fees \%} = 100 * (\text{Other fees}) / \text{Total}$$

Other fees = (agency-absorbed processing fees) + (miscellaneous credits)

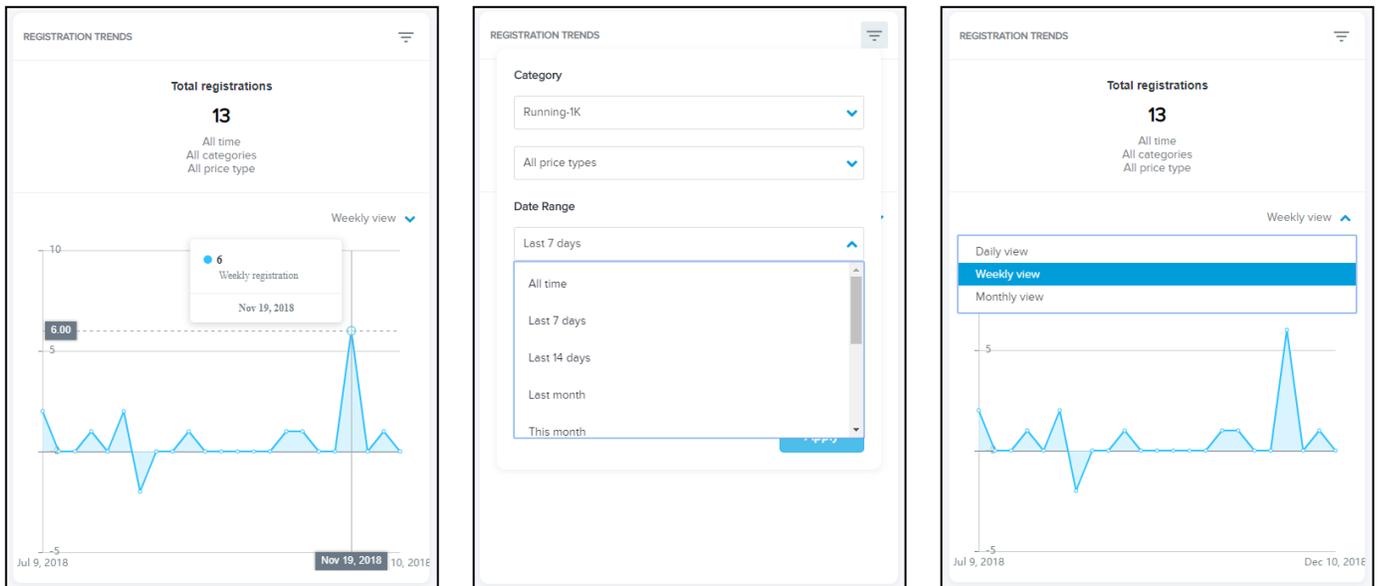
Note that the:

$$\text{Net revenue} = (\text{Revenue gain sources: Total}) - (\text{Revenue loss sources: Total})$$



Registration trends component

See when and how many customers registered for an event **Category** and price type (click  to set the required event **Category**, price type and **Date range**) to determine when to focus your marketing efforts during the registration period.



The **Total registrations** in the selected **Category**, price type and **Date range** is displayed at the top of the component.

The line chart plots the number of registrations in each time interval (select **Daily view**, **Weekly view** or **Monthly view** from the dropdown menu) in the selected **Date range**.

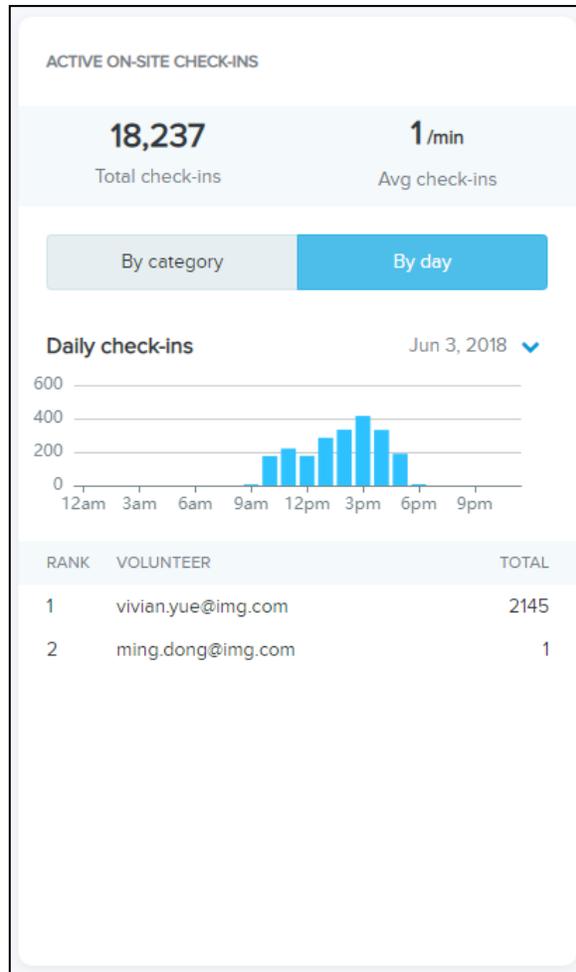
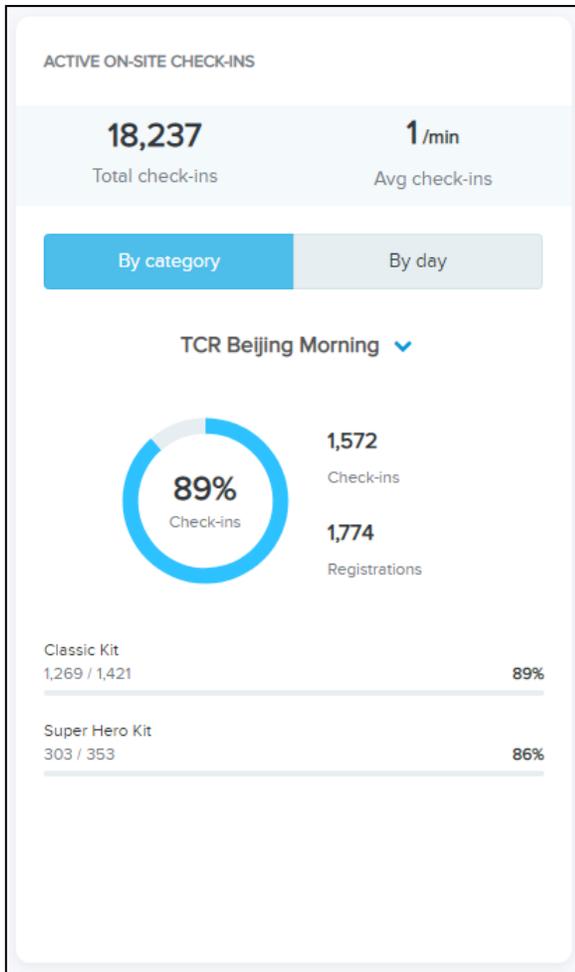
Hover the cursor over a point on the line chart to display the number of registrations in that time interval.



On-Site check-ins component

Track the progress of On-Site app check-ins to the event and determine peak check-in times and which check-in staff are processing the most participants.

See at-a-glance the **Total check-ins** count and the rate at which participants are checking in to the event (**Avg check-ins**).



View check-in statistics for a specific event category by clicking the **By category** tab and then selecting the required category in the dropdown menu.

- The total number of **Check-ins** and **Registrations** for the event category is displayed, together with a pie-chart indicating the check-in progress.
- Check-in progress for each price type in the category is displayed both as the check-ins/registrations ratio and percentage.

View check-in statistics by day by clicking the **By day** tab and then selecting the required day (or **All time**) in the dropdown menu.

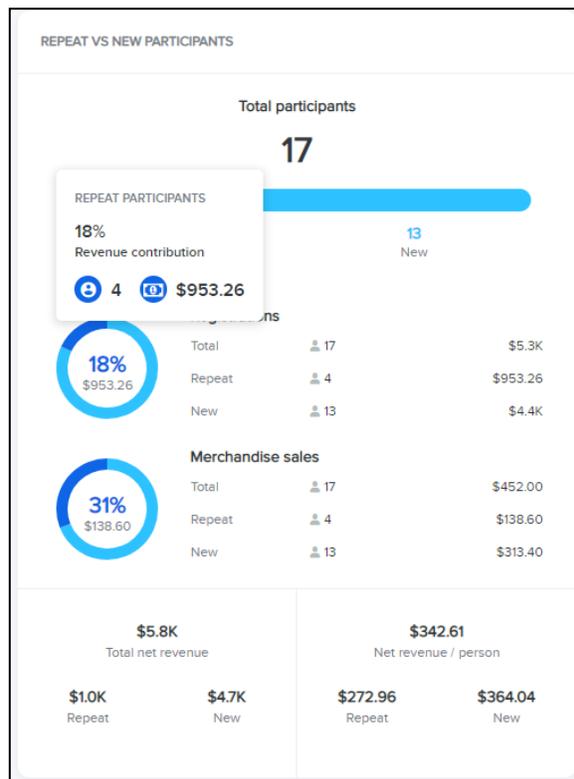
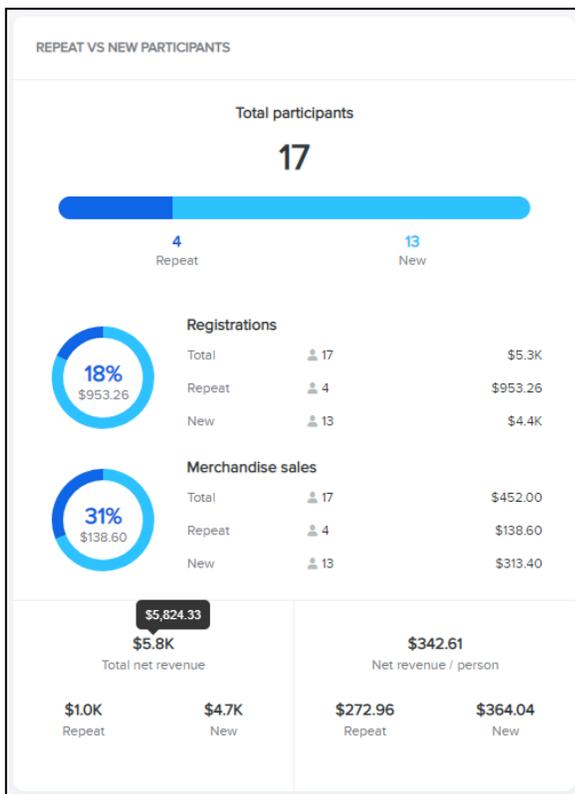


- If a specific day is selected, then the bar chart displays the number of check-ins in each hour of the day.
- If **All time** is selected, then the bar chart displays the number of check-ins on each day.
- See how many check-ins were processed by each On-Site user (**VOLUNTEER**) on the selected day in the leaderboard.

Repeat vs new participants component

Compare the contribution of repeat versus new participants to your event with the **Repeat vs new participants** component.

This component distinguishes between participants who have registered for at least one previous event and those who have never registered for any previous events.



At the top of the component, see the **Total participants**, number of **Repeat** participants and number of **New** participants in the event.

In the **Registrations** section, **Repeat** versus **New** registration revenues are compared in a ring chart:

- The percent and dollar revenue due to **Repeat** registrations is displayed in the center of the ring chart.
- Hovering the cursor over a ring chart segment displays the percentage/dollar revenue contribution and registration count for the segment.
- **Total**, **Repeat** and **New** registration counts and revenues are also broken out to the right of the ring chart.



In the **Merchandise sales** section, **Repeat** versus **New** merchandise sales revenues are compared in a ring chart:

- The percent and dollar revenue due to **Repeat** merchandise sales is displayed in the center of the ring chart.
- Hovering the cursor over a ring chart segment displays the percentage/dollar revenue contribution and merchandise sales count for the segment.
- **Total, Repeat** and **New** merchandise sales counts and revenues are also broken out to the right of the ring chart.

At the bottom of the component, see whether repeat or new customers contribute the most revenue on a collective or individual basis, with the following revenue metrics:

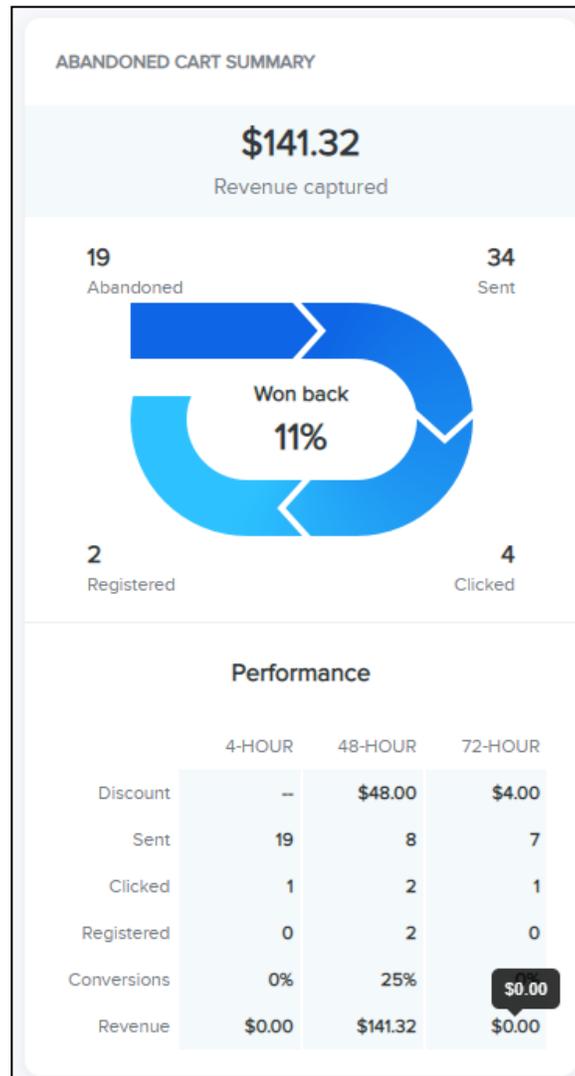
- **Total net revenue** for the event (sum of repeat and new registration and merchandise sales revenues, minus processing fees).
- Total **Repeat** participant revenue for the event (sum of repeat registration and merchandise sales revenues, minus processing fees).
- Total **New** participant revenue for the event (sum of new registration and merchandise sales revenues, minus processing fees).
- The net revenue (registration + merchandise sales – processing fees) per participant (**Net revenue / person**).
- The net revenue (registration + merchandise sales – processing fees) per **Repeat** participant.
- The net revenue (registration + merchandise sales – processing fees) per **New** participant.

Hovering the cursor over any abbreviated revenue amounts will display a tooltip showing the full amount.



Abandoned cart summary component

For organizations using the abandoned cart email feature, the **Abandoned cart summary** component provides insights into the performance of abandoned cart emails at winning back lost revenue from customers who failed to complete their purchases.



The top of the component displays the **Revenue captured** from customers who clicked their abandoned cart emails and completed their registrations.

The chart breaks down the number of **Abandoned** carts, abandoned cart emails **Sent**, emails **Clicked** and abandoned carts that were **Registered**, together with the abandoned cart conversion rate (**Won back XX%** of abandoned carts, equal to $100 * \text{Registered} / \text{Abandoned}$).

The **Performance** table breaks down the performance of the **4-HOUR**, **48-HOUR** and **72-HOUR** abandoned cart emails by the:



- **Discount** incentive offered.
- **Sent** email count.
- **Clicked** email count.
- **Registered** email count.
- **Conversions** percentage ($100 * \text{Registered} / \text{Sent}$).
- Captured **Revenue**.

If the emails aren't performing well, then you can consider adjusting the discount strategy to better incentivize conversions.



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